POL00033632

Training Review Cascade

Sue Richardson

Project & Standards Manager

Thursday 12th January 2012

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Training Review - Background

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- In April 2011, the new entrant training offer for both classroom and on-site, was revised along with the Post Transfer Contact process, and deployed in pilot for the remainder of Q1 & 2, with an intention to review in Q3.
- The purpose of today's meeting, is to cascade the details of these changes , so that you will be prepared for onward communication to your own teams during the remainder of Jan 2012.

2 mins

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The pilot headlines

- An enhanced and updated package of pre-work including on-line Compliance training and testing and revised product distance learning packs.
- Classroom training mandatory for all new Agents.
- A consistent training offer across all segments, including conversational selling skills, skills to increase remuneration and to complete compliant transactions, to conform to Branch Standards and deliver great Customer Experience, with the consequences of failure to comply understood.
- Duration of course increased by one day to accommodate this.
- On Site Training - New Tools introduced to protect our Brand and to support new Agents to grow their remuneration by focusing on their specific customer base.
- Failure to demonstrate skills from Classroom Training challenged and recorded and reported to Contracts Advisors with hands on support given.
- Balance Support -now supports Agents to produce their first Branch Trading Statement
- Post Transfer Contact – enhanced to include extra support and checks through visits and telephone support in the first year.
- Bespoke Packages – having the capability to react in a timely manner to the introduction of all new Post Office® Formats, train in remote locations using mobile kits with classroom session “lifted off the shelf” specific to Branch and to react effectively to the needs of the Network and provide quality training.

5 mins

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Undertaking the pilot review

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- Revisit all of the original stakeholders to seek feedback
- Review the current packages and training materials, considering the feedback. revising as appropriate
- Cascade the results of the feedback and any changes made to the training materials or processes to the Field Team
- Final communication to stakeholders in Jan 2012

5 mins
Revisit all of the original stakeholders to seek feedback
All of the original stakeholders were approached for feedback on the piloted training package, and were asked to submit feedback using the Lose, Change & Keep approach that had been used successfully in the original project.
Review the current packages and training materials, considering the feedback:
Engagement was undertaken with all of the Field Team Leader owners of the training materials and classroom sessions, to go through the stakeholder feedback and deliver any changes or enhancements made as appropriate.
Cascade the results of the feedback and any changes made to the training materials or processes to the Field Team
There will be a number of training events early in Q4 to cascade the results of the review and give detail of any/all changes to formats, packages and materials used for training in Classroom and on-site including the Post Transfer Contact Process. These will be led by the Field Team Leaders with their teams, following their own event on 12TH January 2012.
Final communication to stakeholders January 2012:
All changes will be communicated to the stakeholders during January/February 2012.

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Stakeholders

Directorates:

Network	Julia Marwood
Operations	Paul W Martin
Compliance	Paul Meadows
Agents Policy & Contracts	Tracy Marshall
Legal	Susan Crichton
Marketing	Sarah Munro
NFSP	Anita Turner
Sales & Service	Michael Larkin
Sales & Service	Julie Thomas

Other stakeholders:

Network Services Field Support Team – Regional Managers, Team Leaders, Field Support Advisors, Scheduling & Admin Team and the Field Change Advisor

2 mins

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Timetable

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All of the feedback regarding the Timetable has been captured, but has been deferred to Quarter 4 for action.

Any changes to the Timetable will be made after the Minimum Service Standards are reviewed, as this will have an impact on the content and time of many of the sessions.

1 min

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The Team Leaders

Over to you guys to tell us all about the changes

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Training Review

David Patrick

15 mins

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Feedback Resolutions – Classroom

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Subject: NS&I session 59 & 60

Feedback from Julia & Rita relating to recent product offer changes

Sessions slides were amended in November to reflect these changes and are now in operation

Subject: E Top Ups session 47

Feedback from Frank

•Slide 18 to be removed as it's on a handout

Remains the same – slide simply adds a visual confirmation of product knowledge

NS&I
following NS&I's decision being announced 3rd Nov to only offer its main savings products through its direct channels of post, phone and online by July 2012.
From 28 November 2011
We will not be able to accept new applications to open NS&I Investment Account or NS&I Easy Access Savings Account.
NS&I will begin notifying customers from the end of November to explain their options.
From 21 May 2012
Existing customers of the NS&I Investment Account will only be able to manage their account by post directly with NS&I.
On 27 July 2012
The NS&I Easy Access Savings Account will close to all remaining customers. NS&I will notify customers to explain their options.

Other changes
From 28 November 2011, product material for NS&I Income Bonds, which is already a direct only product, will no longer be available in branches,
NS&I Children's Bonus Bonds will become a direct only product by March 2013. Full details will be available in 2012.
NS&I will remain a client of Post Office for Premium Bonds, which is by far the most popular NS&I product that we offer in our network.

E Top Up

Objectives now achieved:

You can now:
Introduce the features and benefits of Post Office Phone Card.
Process mobile phone Top Up transactions
Process mobile phone E Vouchers

Frank noted that he had no issues with NS&I slides or sessions 7pt1 & 5 Take over a Stock and Datestamp

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Feedback resolutions - Classroom

POST OFFICE

Subject: Regulatory Compliance session 7pt2

Feedback from Frank

•Slide 22 relating to retention of old paper based ID form P4690

Suggests to delete slide & add to notes

To reinforce message slide will remain

•Slide 30 – the video (if available) duplicates message

Video will remain – again to reinforce message

•Slide 4 says 'Activity One' … there are no other activities!

The word 'one' will be taken out!

Note to self – establish when the last paper based form was required to be completed – if more than 5 yrs then consider deletion

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Feedback resolutions - Classroom

POST OFFICE

Subject: Regulatory Compliance session 7pt2 cont'd

Feedback from Frank

Compliance receipts done online do not state which test has been passed.

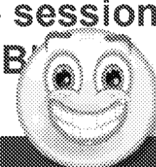
Escalated to Georgina Blair – since resolved?

Feedback from Pete

Compliance workbooks and learning packs should be issued to delegates for reference.

Escalated – but no budget – suggestion not implemented.

FOOTNOTE – The full Regulatory Compliance session 7pt2 is currently being reviewed by Georgina B



It is believed that compliance tests completed via the Intranet now do state the test completed

Georgina Blair (Risk and Assurance) – now in charge of Reg Compliance training material – looking to possibly include the Bribery act in the session

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Training Review Classroom and On-Site Dec 2011

Frank Martin

Classroom Sessions 16, 51pt1-2-3,52.

On-Site 12-21-40-49-71-77-81-82-83-84

15 mins

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FSA Feedback and my actions Classroom

- Blue Cashcheques transaction especially is now very uncommon and could be covered on site if necessary this would give more time in class to introduce Paystation and stress to the delegates' how important Paystation is to the future of the business rather than spend time on paper based transactions that we as a business are moving away from.
- Agree we can take out the session as we cover HMRC cheques in the same session which covers security etc, will look at Paystation session once the timetable has been reviewed. There is also a session on these in the rural transaction guide that can be used onsite.
- Day 2 – add Postage (16) and Cheqs, Deb/Cred (51) card to second day

Follow on with Post office card account 54 pt 1 and Per/ online Banking 51 pt 3

We will look at this when we review the timetable

- 51pt1,51pt3 & 54pt1 - Merge these three sessions and allocate the time to cover properly. They all make use of same technology on HOL and can be run well together. As personal banking cannot be processed on HOL just to give overview only on these.

We will look at this when we review the timetable

- DWP answer sheet - Full driving licence if paper one, or full/ provisional photo driving licence

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FSA Feedback and my actions Classroom continued

•Timetable needs adjusting. Too much information on Day 1. Postage, etc. should be on Day 2 with Day 1 covering the admin sessions, Compliance, Securtity, etc.

We will look at this when we review the timetable

•Session 51pt1 cheque/debit card would be good to have a slide to say what we can and can't accept cheques for.

•No, and the reason for this is we could be constantly changing the slide if the way we settle a transaction changes, bill payments normally have the method of payment on them, there was a communication sent out to branches listing products we can no longer accept cheques for, and we can use debit cards for most transactions and if their not sure we all ways ask the customer to try anyway.

•Day 1 is overloaded. Suggest moving Cheque acceptance to day 2 (see timetable).

•We will look at this when we review the timetable

•Combine the Cashcheques and DWP sessions which are very similar There is no need also for 2 separate questionnaires, these could also be combined.

Good idea combining both sessions and having one questionnaire but will

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On-Site Feedback and my actions

No Feedback on Sessions covered onsite so no actions required.

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Training Review

Julia Mann

10 mins

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Classroom - Feedback

1. 70/72 International Letters etc. Slide 4 - Plain text with 3 headings and list underneath of what can be enclosed in each. Wings are stupid. (Frank's Team)
2. 70/72 International Letters etc. Slide 9 - As all others of this type. (Frank's Team) – Sending overseas conversation
3. 70/72 International Letters etc. - Add cash and jewellery must be sent in polyops, counter focus has picture. (Frank's Team)

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Classroom - Feedback

1. Not implemented as the aim here, is for delegates to use HOL Help to define the 3 rates of International Mail – Letter, Small Packet and Printed Paper.
2. Sales Team are currently updating/re-designing slides and conversations.
3. Not implemented as I checked HOL Help and couldn't find any reference that states cash and jewellery must be sent in polyops. When I enquired about this further and asked the contributor where a picture of a polyop could be added the answer was to slide 23, however there isn't a slide 23!

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On-Site Feedback

1. Ready to Serve - Change to a form that is completed once a week (Monday). (Julia's Team)
2. Ready to Serve Document to be completed weekly rather than daily. By the end of week 1 the Postmaster just goes down the list and puts a tick against whatever was ticked the previous day without reading the question and consequently the form loses it value. (Rita's Team)
3. Ready to Serve document is useful for new agents to prepare themselves. Maybe not to be used on a daily basis when they are more used to the job, but new agent feedback has said as an initial aid it was very useful. (Rita's Team)
4. Ready to Serve - This requires the PM to do a check every day which is too much and not really required. As a result, they tend to do it for about a week or two and then forget it. It would be better if it were a 'once a week' task and maybe the

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On-Site Feedback

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All of this was discussed, and although the general feedback was to change the Ready to Serve document from being completed Daily to Weekly, due to Retail Standards it was decided that some areas could be checked weekly others still need to be completed every day.

Although most new Postmasters may stop completing this document after a few weeks, the importance of the Ready to Serve document should be explained as if it's not followed, themselves and customers of theirs could be at risk.

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On-Site Feedback

POST OFFICE

This document was also shown to and discussed with Mark Lawrence, he thought this was a very useful tool in all types of Branches, especially as the Network Transformation Programme is soon to begin.

Further changes were then made, including adding -

Confidential waste des[illegible]yed as per guidelines

Microsoft Word Document

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Training Review

Sandra McBride

15 mins

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Classroom Feedback

POST OFFICE

- Lose all out of date material being sent to CTO and in prep box.
- Prep boxes have missing handouts/brochures.
- Prep boxes - out of date leaflets included within.
- **Item 08/02 - HOL Help Exercise, was introduced and sent to Swindon but not added to box – this has now been rectified.**

  The process of checking changes to leaflets at Stock Services was inconsistent and not always completed. A new process has been introduced so the items are now checked on a weekly basis so that out of date items are replaced in Training Stores sooner. Some

10 minutes

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Classroom Feedback

POST OFFICE

- Could the sub postmasters be issued with a simplified version of the toolkit that was given to WH Smiths managers, we think this would save on interventions.
- **Unfortunately the answer is No. Most of the information is available on Horizon Help and in hard copy format the toolkit would go out of date very quickly so is deemed as a Business risk. It would also be costly to produce and maintain.**

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Classroom Feedback

POST OFFICE

- DDA pack – is it sent to the office or do they just inherit one? Or could they have one sent to them with the joining instructions so we can cover it in the classroom.
- **The DDA Pack is posted out to the new agent by HR as part of the Welcome Pack**.

- Embed DVD's into the sessions. Example – mails session DVD session 18. This was very advantageous.
- **Yes, this will be done if the DVD's are available in the correct format.**

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Classroom Feedback

POST OFFICE

• With the current format we can tell delegates' How to do something and let them do it on the horizon terminal. But we cant "Show Then" in a full classroom could we have a spare kit in the classroom are more HOL screenshots in the PowerPoint presentations.

This would be too costly to have spare kit and there is currently no budget available. Each delegate has their own kit to be able to navigate themselves.

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Classroom Feedback

POST OFFICE

- 80 Feedback & Closure - Last few slides could be in a better order.

- **The slides have been rearranged and added to EASE.**

- It would be useful to ask a member of the Sales Team to take a 1½ - 2 hour session on sales as they are more experienced than us.

- **All of the team received training on the new sales sessions from a member of the Sales Team in the spring. The Sales and Service Team are revising conversations which will be ready for Q4 then we will look how it impacts on the sessions.**

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On Site Feedback

- Would like to see a place where comments can be left by the on site trainer, e.g. Subpostmaster generally very good however there was an issue when his Paystation crashed three times in one day or Subpostmaster had his rubbish stolen whilst I was on site. This would assist with the PTC process as whoever was completing this element would have an understanding of any problems the Sub was having.
- **A 'General Comments' box has been added to the On Site section of the PSA to allow the Field Advisor to include further comments.**

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On Site Feedback

- Introduce the sales model to Sub Pm and coach them how to coach their staff by using the science behind the conversations. Also how to run focus days and staff warm ups

- **The Sales and Service Team are revising conversations which will be ready for Q4 then we will look how it impacts on the sessions/training.**

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On Site Feedback

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- I haven't really done that much on-site training, however I don't see there is much change here. The main issue I think on site is training a new PM to run a well managed branch and some time in a classroom setup going through basic routines, i.e. Remittances, MVL procedures etc I am sure would be useful, let's call a one day induction (specific training required on back office duties).

- **This should be included as part of the on site training.**

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EASE Feedback

• Set-up a group to change and test what goes on EASE. People using the system regularly should control more of what is on it and where it goes.

• **New items are tested prior to being added to EASE. To make this more visible I will inform team of who tests new documents /processes via the Audit Update, etc.**

•I find EASE so cumbersome and out of date. This is the starting point of all the other bits, so needs to be user friendly and up to date.

•**We will be moving EASE to SharePoint in the next few months where it will be updated. There will also be a much more efficient Search facility. Further feedback will be sought then as we do currently.**

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Training Review

Adrian Paling

15 mins

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As a result of feedback from the whole team a number of change requests were made.

The sessions which are my responsibility are the ones relating to the Sales conversations and positioning of the product. The Sales Team have input into these sessions also as they are responsible for the conversations and compliance for the individual products.

The following slides are broken down into different sections for ease of review.

Lose

Sales Session - Too long a session , delegates don't like it and don't participate, (General comment on all sessions. Not specific to an actual session).

This relates to all conversational sales sessions and is dependant on number of participants and their willingness to participate. Conversations under review by the Sales Team

Session 6 Credit Card - We can only refer to the leaflet

We are obliged to keep this on the timetable if the Sales Team request it. Session is still valid even though we cannot process in branch.

12 pt2 Perfect Branch - See no benefit to this exercise

12 pt2 The Perfect Branch - The content of the slides is poor and basically is already covered in the sessions Business Awareness, Customer Service and The Secret.

Slides are set by the Sales Team and are currently under review. The exercise is designed as an end to the course (for most) which enforces knowledge of conversations. It is dependant on the number of delegates/willingness to participate. No change required to slides, they are just summary slides building up to the exercise. Could be moved to before Stock Balancing session as delegates just want to go home after that.

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Lose continued........

Insurance session is far too long. Could be split and use session on Car Tax to introduce car & bike. Home insurance linked with redirection etc

All of the sales & service conversations and positioning are currently under review and will be available for inclusion in the classroom offer from the end of Q4

Handout – The secret assessing conversations - More beneficial is to replace this with the 'Science behind the conversations' (to go with the Minimum standard conversations handouts.)

No change required. The 'assessing conversations' handout is to reinforce the slide. The 'science behind the conversations' is a 19 page document and is not designed to be given out, more as a reference point although it can be printed as required. This document may change under the current Sales Team review

The Secret - 45 Slides!!! This whole session does not work & is unnecessary if the sales aspect of our transactions are delivered well.

Slides are designed by the Sales Team and are currently under review. The session is designed as a pre-cursor to doing the individual sales sessions showing the science behind sales. Is the issue more to do with the wording on the slides/notes than the session itself?

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Lose continued……

65 Homephone & Broadband - Slide 7 & 11 on handout

No change required. Minimum Standards conversation slides to remain as per all other sessions. These are under review by the Sales Team

Minimum service standards 9/05 - colours, cant read, coloured blind people cant read. States on school for blind, red and green unreadable.

Minimum standards - Sheet 11, 4th triangle along writing unreadable.

Minimum Standards conversations under review by Sales Team. I agree the colours are not ideal. Red and green is designed to be like traffic lights suggesting a route to follow. The handouts/slides could be changed so that the question box has a red or green outline but the in-fill is white with black writing. This would still be identifiable but easier to read. The best practice is to read from the handout rather than the presentation.

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Add/Change

64 Savings - Very wordy slides, could do with a lot of simplification & most of the detail in the notes.

64 PO Savings – Over complex with delegates being bombarded with features on all savings. Let's use the HOL kit in practical support of products and services ie concentrate on instant Saver which can be processed on HOL, and also premium bonds which again can be processed on HOL. Quick overview showing web site on our other products.

The Sales team have ownership of the content of this session. Inputting on HOL is an option but will add time to the course. It is a 'scan barcode' transaction so not hard to do. Time is better spent doing other practical's. The Savings session now has an extra slide showing direct sales products (as of 01/12)

12 Customer service - Better if merged with session 1 Intro, too late in the course by day 2

No change required. The 'intro' session on day 1 is an introduction to the course itself. Session 12 Customer Service is a pre-cursor to Session 12 pt 2 and sets the scene for that session.

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Add/Change cont……

POST OFFICE

Insurances, link them to sessions – example, home insurance linked with redirection rather than 3 hours on insurances.

Concentrate on practical 'Customer Referrals' exercise using Car Insurance / Home insurance. Can't remember if we can completely process Over 50 application on HOL in classroom. If we can have an exercise on taking application and in depth selling scenario using Over 50 Prospectus.

Insurances - Very brief overview on Insurances and where to access info ie website, or Help.

Inputting on HOL is an option but will add time to the course. It is a 'scan barcode' /follow the prompts transaction so not hard to do. Time is better spent doing other practical's. No harm in doing a customer referral transaction but can be at discretion of instructor rather than a scripted transaction

Could be linked into other sessions but would mean a lot of work and agreement as to where they would sit best.

Session is under review by Sales Team so best to wait until outcome of that.

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Keep

Minimum Standards Conversations handout very good starting point for delegates

12 pt2 The Perfect Branch - no issues

61 Insurances - no issues

The above points seem to contradict other feedback. This seems to suggest that the sessions are only as good as the delegates/instructor make it. Some people embrace the sales sessions whilst others simply read from the notes. Is it a confidence issue in the delivery of the slides that has this effect? Do we need to give extra support to those delivering courses or can the slides be better? There could be more notes but then you are in danger of them sounding too scripted

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Issues

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My feeling is there should be a course written completely from scratch that is aimed specifically at someone who will have to run a branch by themselves after a couple of weeks or so. As a for instance, we could cover Rem's more fully.

The notes are very full now almost scripted and even though I tried to follow them I found I was talking ahead of the slides. I do find it hard to train with the notes in front of me meaning that I have probably missed something that was important. When I was running courses back to back I developed my own style and more importantly, made changes. So the next course always ran smoother than the previous one, unfortunately this doesn't seem possible now, which I fully understand.

I didn't really understand slide 14 in session 9, and there are no notes. The notes for slide 6 say, 'you may have seen this before', when did the delegates see this slide before? If we are going to simply put another presentation designed for a different type of audience into the course, can we at least make some changes to reflect what we are about? In fact I wasn't comfortable delivering this session as although it clearly is important, I didn't feel qualified to deliver it. It is clearly designed to be delivered by an experienced sales manager.

General comment on running a course. It does suggest that if you do classroom training on a regular basis, you are able to understand the course content better and develop a fluidity in your delivery. This can only be obtained by doing courses regularly and so is dependant on geographical location and delegates availability. Slide 14 on Session 9 The Secret is a little confusing. It seems to compare branches that have been on a sales workshop for Mails against those that haven't although it is not too clear what it all means. Do we need someone from the Sales Team explaining/running this session at one of our Patch meetings? Hopefully this is under review and it will become more clear. Notes on slide 6 relate to the instructor seeing the slide before, not the delegate.

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Issues cont…..

Minimum Standard Conversation would have been useful if they had it sent to them with the distance learning pack so they would be able to look at it in advance so as to see what they would be doing when we cover the perfect branch.

No change required. Previous feedback suggested too much was in the DLP so it was reduced dramatically as a result. Minimum standards document is introduced earlier in the week so they are aware of the conversations and have practiced them a number of times by then anyway.

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Timetable feedback

POST OFFICE

Focus CTC on core products and leave sales until a later date

No change. Need to embed some sort of sales awareness from the outset. It is the best environment to do this in the classroom as there are no other distractions

Spmr's feel the sessions are too rushed. Too much info in a short period of time (Three people commented on this)

Sessions are only as fast as the slowest delegate. Maybe the ones saying they feel rushed are the slower delegates? There is a lot to do on each day so some sessions may feel rushed but instructor has to take other variables into account. Ie. Bus/train times, travelling and even room availability times.

Not long enough in classroom.

We had this when it was 10 days long. There will always be somebody wanting longer.

Not enough practical sessions. More opportunity to put into practice what has been learned. (three people commented this way)

Agree although it is at the instructors discretion to do random practicals as time allows. Most delegates are in by 08:50 so could do some transactions then using spares in the branch. More practical's have been built into the new course.

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Timetable feedback cont…..

Day 1 of the counter training course is too busy. To do the Introduction/Horizon/Stock unit/Postage/All the mails/ Cheques/Postal orders on the first day is too much for them to take in. 1st -2nd-recorded delivery-special delivery is too important. The Mails session needs to be changed to a first session later in the week.   (All NFSA's who deliver CTC said this)

Agree on this but proposed new timetable has moved Cheques/Debit cards to day 2 and allowed extra time for RM transactions.

The Insurance and Moneygram sessions are only available to delegates who do Passports/MVL.

Moneygram can be done onsite really quickly and maybe the insurance sessions could be spread onto each relevant cross-selling opportunity's transaction. Ie: Home Insurance could be introduced during Mail Redirection. Car/bike/van could be done whilst doing MVL's. This would mean a lot of work though as each session would have to be changed to include the sales conversations which are under review.

There should be 15 mins each day for delegates to complete their PSA.

I would suggest, and this is done as best practice in my team, that the PSA is completed at the end of every session rather than at the end of the day. It is still fresh in their mind at that point.

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Summary

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You are probably all thinking that I haven't done much here and you are correct to a certain extent

The sessions for which I have responsibility are mainly completed by the Sales Team so until I know the outcome of their review I can't do much either. New conversations will be coming out shortly so that will affect us all in the New Year

The feedback I have had has highlighted areas for improvement. Hopefully some, if not all of these, will be addressed by the Sales Team's review.

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Training Review

Bob Collins

Delivery time 15 minutes
No changes requested by anyone in the team for either on-site or classroom, with some comments listing responsibility “no issues”.
Reference to some timings within classroom course. To be dealt with in general timings review.

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On-Site

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- Greenfield Pack
- Grapevine
- Follow-Up Balance Process
- T.C. & Suspense Account Handouts
- Lottery Handout

Greenfield – have worked on pack with Cheryl Wingfield and Gillian Alstead throughout year to update pack with support from Chris Pereira, Gaynor Davies and Sean McCaughey.
Grapevine – Liaised with Dave Pettitt to cascade Grapevine to all FTL's WTL's. With information and agreement Grapevine updated supported by Dvae Young and Neil Stewart.
FUB – Agreed new and better process with Anne Allaker, re-wrote and placed on EASE August/September.
T.C. & Suspense. Handouts modified to match any change.
Lottery Handout – V3 of 81/2 updated and tested (DY) October to reflect changes to icons and process.

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Classroom

- Security
- POCA Pt 1 and 2
- Redirection of Mail
- MoneyGram

Security – Session updated and placed on EASE with stakeholder agreement/input during the summer.
POCA – Updated to match any changes during the year.
R of M – Handouts revised with Anne Lealman's list of big errors last spring placed on EASE with support from Anil Chowdhry.
Moneygram – reviewed and no changes required,

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And finally........

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Questions?

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Training Review

Chris Gilding

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Lose

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Lose	Classroom / OnSite / PTC	Description	Contributor	Response i.e what if any change made or reason why not.
Lose	Classroom	46 Cash Management - Relevant only to Sub Postmasters. Can be covered much better on site.	Julia	No change - Important to stress the impact on business profitability for all to see.
Lose	Classroom	PSA – daily - A few seconds after each session is all that is needed for trainees to enter any comments on their PSA. We also have 1 ½ hours on the last day to catch up if necessary.	Chris G	Agree best way forward (a) as listed here or (b) formal sessions remain. Await outcome of timetable changes in Qtr 4
Lose	Classroom	1&4 Intro H&S - Wording on slide e "interesting" about yourself.	Frank	"Interesting" removed
Lose	Classroom	Business Strategy - 3/4 shows values as FACTS	Frank	Was updated in June 11
Lose	Classroom	Introduction to horizon 8/1 - Q3 customer has £5	Frank	Was updated to £6 on 7th July

Add / Change

Change	Classroom / OnSite / PTC	Description	Contributor	Response i.e what of any change made or reason why not.
Add/Change	classroom	Not sure what you cover in the 'intro' bit but we need to make sure that we bring this session into line with our Post Office Story .... (do we show our heritage video?) ... are the values in line with the PO Story stuff around care, passion and trust?	Julia Marwood	Intro session is a course overview only. The Post Office Story video sits better in Business Awareness so has been added to this session
Add/Change	classroom	Bit concerned that there is absolutely no mention in the objectives about focusing on providing a high standard of 'customer service' ... the focus seems to be sales and transactional! I think the first or second bullet needs to reflect the importance of providing a high standard of service to the customer (as well as selling of course!) but if you get the first right the sale will come as a matter of course.	Julia Marwood	Customer Service covered in Business Awareness session

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Add / Change

POST OFFICE

Change	Classroom	Description	Contributor	Response i.e what of any change made or reason why not.
Add/Change	classroom	Network Accessibility (replacement for DDA) needs to be explained to new Agents.	Sally Buchanan	New slides 23 - 26 added to Session 3 Business Awareness

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Add / Change

Change	Classroom / OnSite / PTC	Description	Contributor	Response i.e what if any change made or reason why not.
Add/Change	Classroom	HOL Help - Exercise similar to that for COM's. Use questions that we know will be asked in branch eg DVLA VED; stores catalogue; country codes; customs; prohibitions etc	Julia	Not essential as this is an exercise in navigation only. However 3 questions have been altered to cover regular searches..
Add/Change	Classroom	PSA - Retention – how long? Who it's sent to – Contract Admin Team not branch support Team	Lee	Retention Periods listed at end of guidance notes.
Add/Change	Classroom	PSA needs to be revisited as we feel at the present it does not give a guide to how the delegate has performed in the classroom.	Pete	More detail required.
Add/Change	Classroom	Stock balancing is only 2 slides and that is taking about cash management, which has already been covered in an hour's session. It needs to have more reference to all aspects of balancing – for example, TP and BP, net discrepancies' settling centrally, transaction corrections and rems.	Pete	2 new slides added to explain balancing terminology and accounting procedures for Gains & Losses

Add / Change

POST OFFICE

Change	Classroom / OnSite / PTC	Description	Contributor	Response i.e what if any change made or reason why not.
Add/Change	On Site	PSA Alter PSA so if you mark a subject as Red then a comment feeds through to the action plan (make it the same as the CAT reporting tool).	Rita	PSA Updated so that Name and Branch from Cover Page flow through to Action Plan. On site tab has button to click if any RED items appear, these will then flow through to the Action Plan. New tab added for PO Local on site.
Add/Change	Classroom	Add more information regarding how a branch works difference between office & stock unit, TPs & BPs, how Horizon accounts for transactions.	Linda	2 new slides added to explain balancing terminology and accounting procedures for Gains & Losses
Add/Change	Classroom	1&4 Intro H&S - "something about yourself.	Frank	As above
Add/Change	Classroom	Business Strategy - New values are FEB	Frank	Was updated in June 11
Add/Change	Classroom	Introduction to horizon 8/1 - Change this to £6	Frank	Was updated to £6 on 7th July
Add/Change	Classroom	1 and 4 session H & S - slide 14 mis spelling	Frank	Version 1.4 - changed to Location

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Add / Change

POST OFFICE

Change	Classroom / OnSite / PTC	Description	Contributor	Response i.e what if any change made or reason why not.
Add/Change	Classroom	Slide 3 H&S - add the word NO TEXTING on mobiles	Frank	Wording changed to - Mobiles - switch off. Only use during breaks, your full attention is required. The CTO nos. should be passed to delegates as an emergency contact.
Add/Change	Classroom	H&S slide 16 - Green line around items for 10kgms plus	Frank	No change as H&S is an overview session only, don't want to get bogged down in too much detail. Also Green Line is no longer a requirement. Parcelforce session covers this.
Add/Change	Classroom	Introduction to horizon trainers notes - Add after slide 5 but before 6, delegates need to log on with the cto user name, create themselves,THEN they log out and log back in using their new user. Then complete the practical exercise	Frank	Notes added to slide 6
Add/Change	Classroom	Ses 46 slide 3 notes - add in calculation how we got to the	Frank	Explanation of how the sum is calculated has been added to the notes

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Issues

Issues	Classroom / OnSite / PTC	Description	Contributor	Response i.e what if any change made or reason why not.
Issues	Classroom	The new Help navigation exercise - This new exercise crucial to the new course to 'sow the seed' of the importance of the Help function was not in my prep box (2 weeks ago). I had to print off my own copies. *Confirmation required that this will in future be included.*	Chris G	Sandra confirmed that 8,2 is a Reprep item, 8,3 is adhoc and should be printed by FSA's as required

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POST OFFICE

Training Review

Lee Heil

Welcome everyone and give a brief description as to what this is all about.

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Onsite

The staffing levels at some PO Local's. It is impossible to train out back on and all the sales assistants and keep the branch from being error free.
Bob Collins

No change as Classroom courses for PO Locals being introduced during rollout.

Onsite too short at times - Once the transfer audit is done, the balance is shown on a Wednesday and a half day Saturday there is not always time to cover topics
Dave Ogleby

Standard training package. The training package would have to increase. Forms part of this review.

Introduce what feedback we had. I.e Onsite, Classroom, Intervention

Who gave feedback and the reply for Onsite

Should take no longer than 3-4 mins

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Onsite

Transfer day-even if transfer audit is efficient (cash/stock neat/tidy/well presented)-delays on transfer of deeds/funds due to solicitors/banks can make it a late opening (or even next day). Can funds/deeds be transferred the day before?
David Patrick

Good idea but issues arise from this.

Who is responsible for access to building, keys, security overnight? Is the new agent confident of what they have to do?

This has been done before where transfers were arranged for Wednesday half day closing and at 5.30pm on other days.
This still cause delays as with any sale of business or house it all depends on when the deeds/funds are transferred. This still caused the transfer to roll over in to the following day.

Both outgoing and incoming both agree a transfer date but this would need to be made clear to them that the deeds/funds would need to be transferred the day before.

Onsite continued

You take no longer than 5 mins.

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Onsite

When training on site hours tend to be longer than when auditing so can accrue quickly. Also time to prepare handouts, /finish audit reports / fill in PSAs /Action Plans needed,& especially with FUB now a longer activity much longer -. I suggest day after FUB as an admin day (if a late balance how do you get 11 hours break if an early audit start required), and a prep day before. If last day on site is a Wednesday, an audit Thursday AM is again inadvisable.

David Patrick

This would reduce resource available to achieve the audit plan and accommodate transfers and classroom/onsite training and any other BAU activity

Audits are best scheduled for a Thursday following a balance and TP and it is only the Lead FTM that would be required to complete paperwork.

It is the responsibility of the FTL to manage the performance and activity of their team and should flag this up to the Scheduling & Admin team as an exception as this would not be the rule.

Onsite continued

Approximately 4 mins

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Classroom

POST OFFICE

Classroom should be made a specialist that is not to say that no one else should ever do it. All should be given the opportunity to cover if necessary. We feel it gets watered down if it is not done for a while, and this is not fair on the delegates.

Pete Jackson

Every FTM should be able to deliver a classroom course.

It is the role of the FTL to manage the activity and performance of each individual to ensure they can deliver the course confidently.

If 'Specialists' were to be introduced it would restrict us to the number of courses run and the location.

Currently if a FTM has been scheduled to deliver a course that has not done one for a while it often reverts back to the FTM that regularly delivers them as they are not confident enough.

This results is reorganising work plus also scheduling FTM to shadow another FTM thus effecting the resource availble for other activity

Start of Classroom feedback

Approximately 4 mins

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Classroom

Time needs to be allocated to ensure materials are up to date in CTO long before prep day as not enough time to get up to date POPOS especially if OOD material missing in prep box.

Rita Kendellen

This would increase days allocated to classroom and would reduce resource available for audit and training activity
This cannot be done to early as the materials would be out of date before the course started hence the prep day.

A possible solution would be to check the materials during the Health and Safety checks carried out at the CTO's every 3 month.

Keep the sessions so that just 1 FSA can do the whole course rather than in the past having 3 FSA's to do Modules 1,2 and 3. Works well and is easier to Resource

Lee Heil

This give consistency for the delegates and allows the FTM's to gage the understanding of each delegate across the 6-8days.

Classroom Continued

Approximately 4-5 mins

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Intervention/All

POST OFFICE

There is not enough information on the Intervention Request form / have found the visit unnecessary on arrival. (Two people commented this way)

Chris Fayers

Information is provided by the requestor on a form to the Branch Support Team. Pat Bursi's team updates SharePoint from the information provided

For every intervention a phone call should be made to the branch if it is relation to training at the first instance to establish what is required and whether it can resolved over the phone or if a visit is required.

A call should also be made to either Pat Bursi or the requestor of the intervention if unsure of the request for them to explain in more detail.

I know we use Mondays etc when free to update ourselves, but occasionally preparation time and keeping up to date should be scheduled.

All

No change as this is the responsibility of the FTL to manage performance and activity of the FTM.

Intervention and other feedback

Approximately 5 mins

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Training Review

Rita Kendellen

10 mins

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42 pt 1 Travel Insurance

- **Slides 16 & 17 are wrong way round**

This has been altered

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42 pt 2 Travel Money

- **Slides 34 & 35 are wrong way round**

Changed

- **Pre-order does not work on HOL so should be overview**

One slide was added as this was not previously covered in the classroom. Instruction says 'talk through process'

- **Rem in currency and concentrate of buy and sell of Euros**

Instruction to Rem in currency to be added to prep information

- **Overview of Travellers Cheques as cannot be processed**

TCs available in adhoc materials and can be processed

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42 pt 2 Travel Money

POST OFFICE

- **Bureau session needs to be more appropriate to offices on courses**

The session content needs to cover all areas of Travel Money which can then be delivered as appropriate depending on the mix of the delegates on each course

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42 pt 3 Passports

- **Slides 11 & 12 wrong way round**

This has been altered

- **Session would be easier if used example from previous course**

A blank application has been added as the initial practical for delegates to complete themselves. There are still two practicals available for the end of the session.

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Transfer Audits

POST OFFICE

- Offices are not opening until late afternoon on transfer day because of the time to transfer funds. This causes failures in customer service due to closed branches and no training taking place on the initial day.

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Transfer Audits

POST OFFICE

Understand the issue this causes on maintaining customer service and the impact on resource if transfers are moved to afternoons and training scheduled to start next day.

Adding a question to Qtr 4 Transfer SharePoint to gather information on opening times of offices following transfers.

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POST OFFICE

Training Review

PTV, MVL, AEI & Postal Order Feedback

Pete Jackson

10 mins

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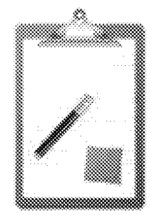
Post Transfer Contact (PTC)

1. Lose cash check at PTV, the office will be audited within the first 9 months

A cash check has to be done at every visit.

2. Some of the questions don't apply to new Spmr who has existing staff

The questions are to establish good working practises are in place as well as the new Spmr's progress



3. Lose 1 month phone call

To remain – contradicts other views

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PTC

4. Move PTV to 1 month

Schedule and T&S will not allow 1 month visit unless after call it is obvious if an Intervention visit is required

5. 1 month too soon to contact Spmr

The phone call to be made 4 weeks after FUB

6. 1 month call can be difficult if Spmr has a queue

The call needs to be arranged at a convenient time for the Spmr. This has been added.

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PTC

POST OFFICE

7.NFSA's to carry out 3 months PTV's

NFSA's carrying out 3 months PTV's has been addressed

8. It can be impractical to carry out 6/9 mth audit and PTC

In the reviewed instruction it states that if impractical to carry out PTC after audit the NFSA to arrange a visit.

9. Questions too repetitive for each contact

They have been reviewed and made less repetitive

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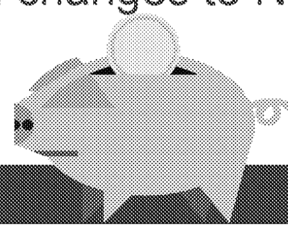
PTC

10. Self Audit – Product questions should be more specific such as "If Premium Bonds are purchased on 3rd December which month will they be eligible for the draw?" As to "my staff and I are competent in knowledge of NS&I products"

The question is designed for Spmr and their staff to become conversant with products but nothing to stop the NFSA/NFSTL asking specific questions such as stated to verify their knowledge. Will need to be reassessed in the near future with changes to NS&I.



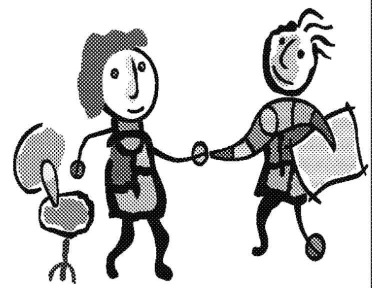
PTC

11. Amend for Locals – especially for PTV re sales & remuneration

    Already addressed

12. Problems with the new Spmr not receiving the Welcome Pack or the DDA Guidance Pack.

    Recruitment are emailing these to the new Spmr. This is being addressed.



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PTC

13.Security additions to the Self Audit document.

These added at Wayne Griffiths request

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MVL's

14. V11 do not match HOL on price

Cannot be altered as V11's and Tax Discs will always be out of date

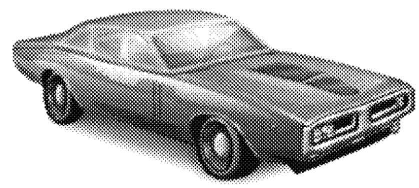
15. Add 2 day rule for taxing a break in tax at end of month

Extra slide put into session

16. Add handout for spoiling tax disc's

to prep box

Put in place



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AEI

POST OFFICE

17. Any scope for mentioning AEI service?

To remain as part of the on-site training as by proportion of delegates there will only be a few.

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Postal Orders

18. Postal Orders - Slide 10 not in keeping with other presentations when indicating a practical is to be done.

The slide is designed to put the delegates into the correct frame of mind. Also same style in MVL's

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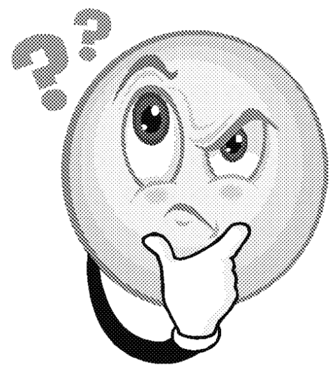
Any Questions?



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Training Review

Linda McLaughlin

6 mins

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Review of Training Suggestions Lose/change/keep

Suggestions and Preferred outcome	Lose , Keep, Change. Why?
Session 30 could be covered better in daily revision - Lose	Keep. Isolated comment.
Session 18 lose slides 16,17,26 and 38deemed unnecessary -Lose	No change , useful for re-iteration.
Royal Mail session 18 not enough time to deliver - Change	Hold until quarter 4 new timetable may be imminent.
Covering Special delivery and signed for with Inland session 18 difficult in 2.5 hrs. A separate day perhaps -Change	Hold until quarter 4 new timetable may be imminent.
Revisit session 18,order of slides and content of slides -Change	No change.

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Review of Training Suggestions Lose/change/keep

POST OFFICE

Suggestions and Preferred outcome	Lose , Keep , Change. Why?
Mails revert to 1st 2nd recorded, special as a way to introduce products - Change.	No change.
Session 18 Inland Mail slide 8 untidy slide 9 to many words – Change	No change to slide 8 ,Slide 9 will have points moved to the notes section.
Session 28 pt1 Mixed Business deposits and too much mention of Alliance and Leicester instead of Santander – Keep	Most references now removed re A & L. New G20 and new Santander cheque envelope slides. Change and Rewrite.

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Training Review

Dave Ogleby

5 mins

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REQUEST: Add to Pre Training Checklist (EASE – On Site – Training Forms & Guides)

SPECIFICALLY: Ask outgoing SPMR to make sure POPOS and forms are up to date

ACTION: Yes, form updated

REASON: Should make training easier, with branch being compliant with POPOS

On session 23:
Slide 10 - What are your other income opportunities?
Slide 11 - What do you think this refers to? X3
Slide 12 – Income reminder comparisons
Slide 13 - What are the two services we've just covered? When would customers want to use these?.
THESE ARE ON DIFFERENT NUMBER SLIDES ON SESSION 43 PT1 & PT2

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REQUEST: Modify parcel sessions for classroom

SPECIFICALLY: Some slides repeated over all sessions, could be repetitive (23 and 43 pt1 & pt2)

ACTION: Slides to stay the same

REASON:

1) PO Sales Team are currently looking at modifying conversations, so leave sessions as they are currently
2) These slides make reference to thinking about income generator opportunities, and confirm understanding of each product session

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Thanks everyone!

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Headline Summary

POST OFFICE

- Many minor changes have been made to slides and supporting material to provide clarity
- The timetable will be reviewed in Q4 once the outputs of the Sales & Service Team review have been included in the sessions
- The requirement for all newly appointed Agents to attend classroom has been clarified to say this must be the Officer In Charge of the branch and the 2 day refresher course for existing partners considered
- Improvement made to the checking of Prep box information to ensure all out of date material is removed before despatch
- Improvements planned for EASE navigation when the move to SharePoint is completed
- Enhancements made to the presentation of Grapevine throughout all training and Post Transfer Contact all security sessions reviewed with the Security Team
- User enhancements to Performance Standards Assessment (PSA) delivered
- Compliance Audit in Post Transfer Contact (PTC) process , moved to 3 month visit to reduce length of day at 6-9 month and to address any Compliance issues at an earlier stage
- Competent and confident Field Support Advisor's (FSA) now to deliver 3 month Post Transfer Visit (PTV)
- Bespoke PTC process introduced for PO Local

5 mins

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Next Steps

POST OFFICE

- Deliver training to FSA's through WTLS in Jan/Feb 2012
- Send report out to all stakeholders- All stakeholders will receive a copy of this report and appendices w/c 23rd January 2012
- Return to BAU revision timetable for maintenance of materials
- All new materials will be deployed in training from February 2012
- Through Q4 deliver new training package for Mains branches
- Update classroom timetables and materials following the Sales & Service Team review
- Pilot a new offer for all size of PO Local branches- including classroom training for all new Operators

5 mins

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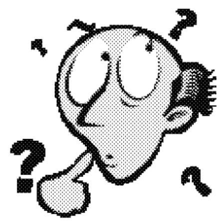
POST OFFICE

Any last questions?



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Thank You

Safe journey home